

# Monthly Insights Report

November 2025



## Insights Commentary – November 2025

**The Kings Road District continued to record a strong trading performance during November 2025, following on from positive results during October.**

**Footfall increased annually (+5.8%), and by nearly twice as much as in the West End (+3.4%) . Both ends of the District recorded rises in visitor numbers, although the increase in the East (+7%) was more than double that in the West of the District (+3%).**

**Spending in the District also rose annually (+10.1%), once again driven by increases in both domestic and international spending, although the rise in international spending (+27.6%) – which accounts for a quarter of total spending in the District - continued to outpace that of domestic spending (+4.4%). November 2025 was the fourth consecutive month during which the rise in international spending exceeded that of domestic spending.**

**The profile of domestic and international spending during November 2025 differed. Domestic spending during November mirrored that of October 2025, with the increase wholly fueled by a rise in the average transaction value (ATV) (+9.6%) whilst the number of transactions declined(-4.5%) - indicating that those who did make purchases spent more. In contrast whilst international spending during November 2025 was fueled by a significant annual increase in the number of transactions (+25.7%), the ATV increased very little from last year (+1.5%). This differed from October 2025 when the ATV for international purchases increased.**

**Spending within the District during 2025 has been positive in every month, with only international spending dropping marginally from 2024 during May and July. Over the 11 months to November, spending has increased by +8.3% from the same months during 2024.**

- ❖ Year on year on increase in footfall of +5.8% across the District (+3.4% in the West End)
- ❖ Year on year increase in footfall in the west of the District (+3%), and in the east (+7%)
- ❖ Year on year increase in total spending (+10.1%)
- ❖ Year on year increase in domestic spending (+4.4%) – decline in transactions (-4.5%) and increase in ATV (+9.6%)
- ❖ Year on year increase in international spending (+27.6%) – increase in both transactions (+25.7%) and in ATV (+1.5%)
- ❖ Year on year increase in both domestic and international spending for the year to date (+7.3% and +11.3%) increasing total spending (+8.3%)
- ❖ Domestic spending accounts for 71% of total spending, and international spending 29%
- ❖ Average transaction value of domestic purchases in October 2025 was £31.96 vs £57.15 for international purchases

# Key Highlights – Footfall – November 2025

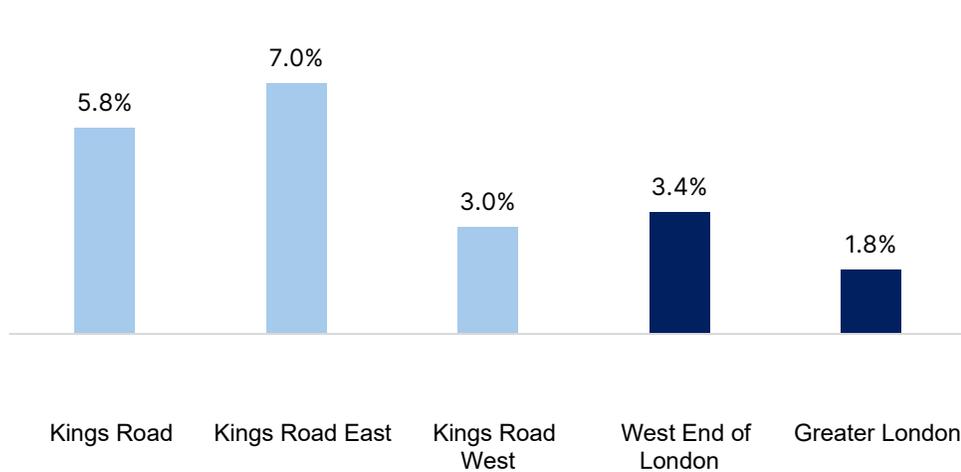
Footfall – November 2025		
	YoY % Change	MoM % Change
Kings Road	5.8%	8.4%
Kings Road East	7.0%	11.9%
Kings Road West	3.0%	1.1%

Footfall Benchmarks – November 2025		
	YoY % Change	MoM % Change
West End of London	3.4%	10.5%
Greater London	1.8%	2.8%

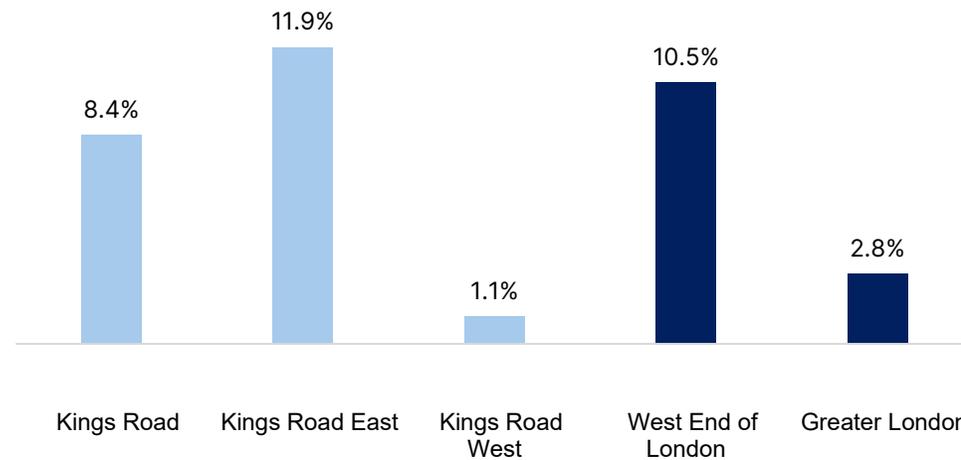
Source: MRI

Source: MRI

Year on Year % Change in Footfall - November 2025

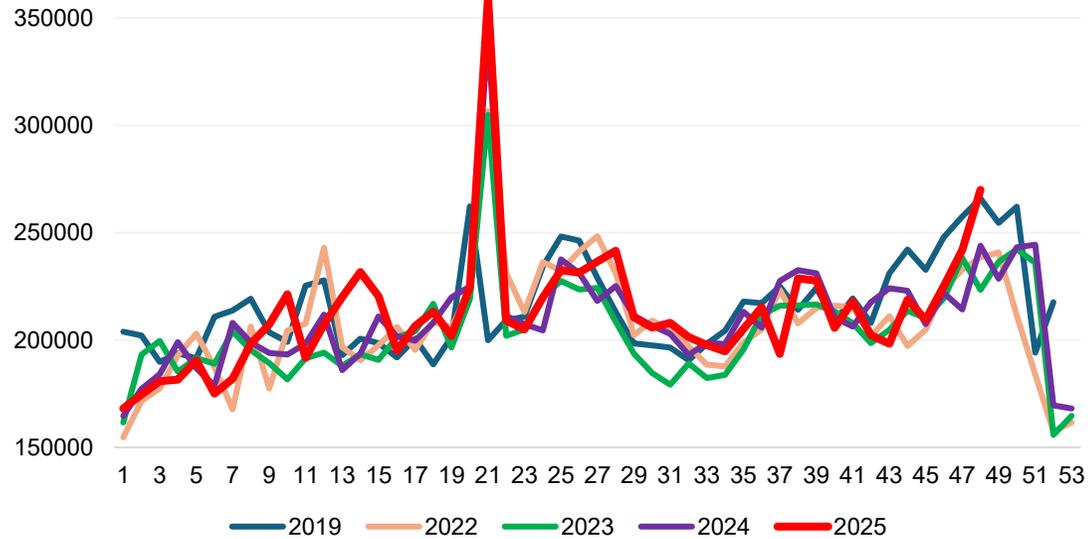


Month on Month % Change in Footfall - November 2025



# Key Highlights – Footfall – November 2025

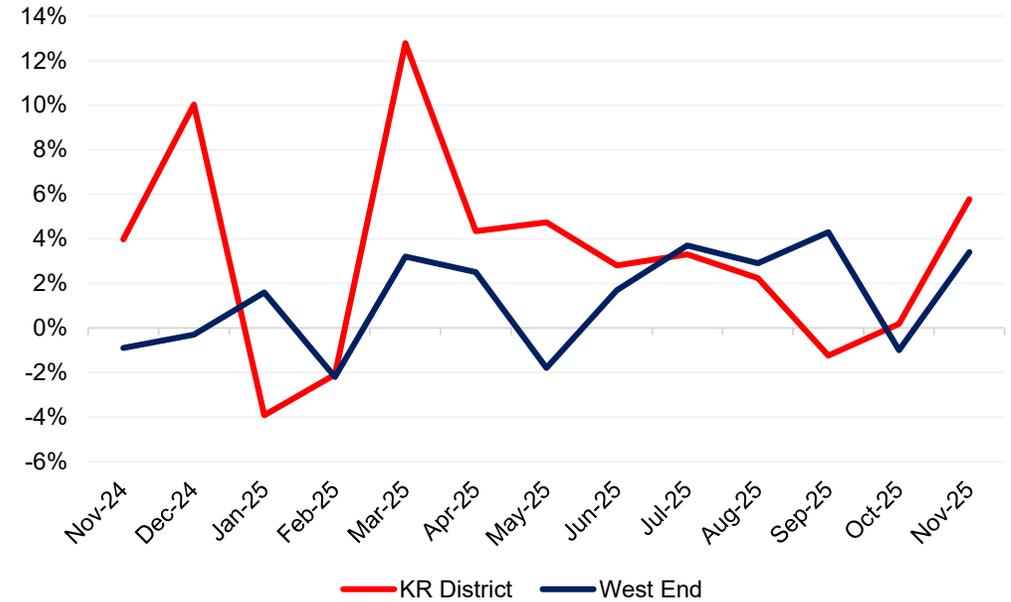
Weekly Footfall<sup>1</sup>



<sup>1</sup>Locations: King's Rd (Chelt'ham Terr) East; King's Rd (Chelt'ham Terr) West; King's Rd 34 (Trotters) East; King's Rd 34 (Trotters) West

Source: MRI

Year on Year % Change in Footfall by Month - KR District vs West End



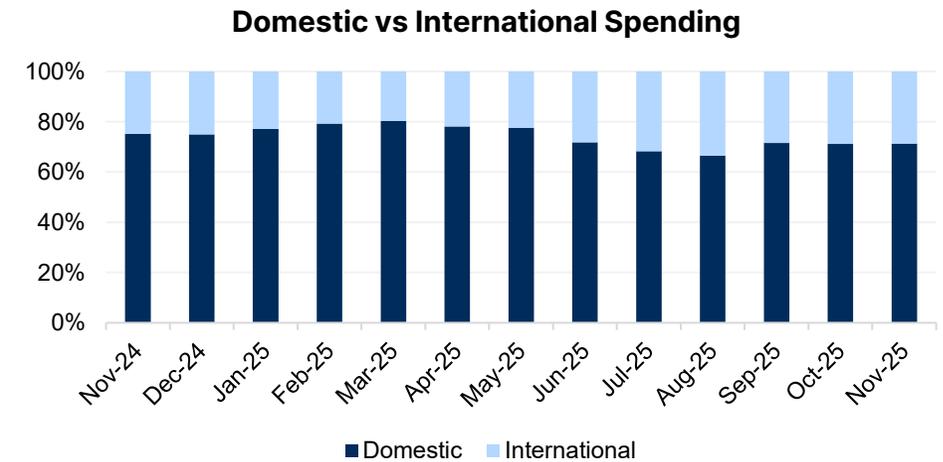
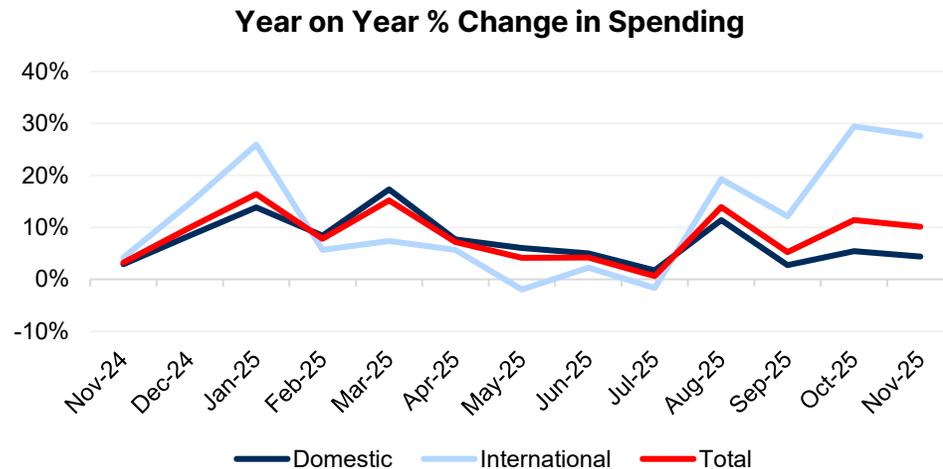
Source: MRI

# Key Highlights – Domestic and International Spending – November 2025

Domestic vs International Spending (£ million)			
	Domestic spending	International spending	Total spending
Nov-25	£7.98	£3.22	£11.20
Nov-24	£7.64	£2.53	£10.17

Domestic vs International Spending - % Change - November 2025			
	Domestic spending	International spending	Total spending
YoY % Change	4.4%	27.6%	10.1%
MoM % Change	4.4%	4.1%	4.3%
YoY % change YTD	7.3%	11.3%	8.3%

Domestic vs International Spending Split		
	Domestic spending	International spending
Nov-25	71%	29%
Nov-24	75%	25%



# Key Highlights – Domestic and International Transactions – November 2025

## Domestic Spending - YoY % Change - November 2025

	Transactions	Average Transaction Value
Nov-25	-4.5%	9.6%
Nov-24	-11.5%	16.9%

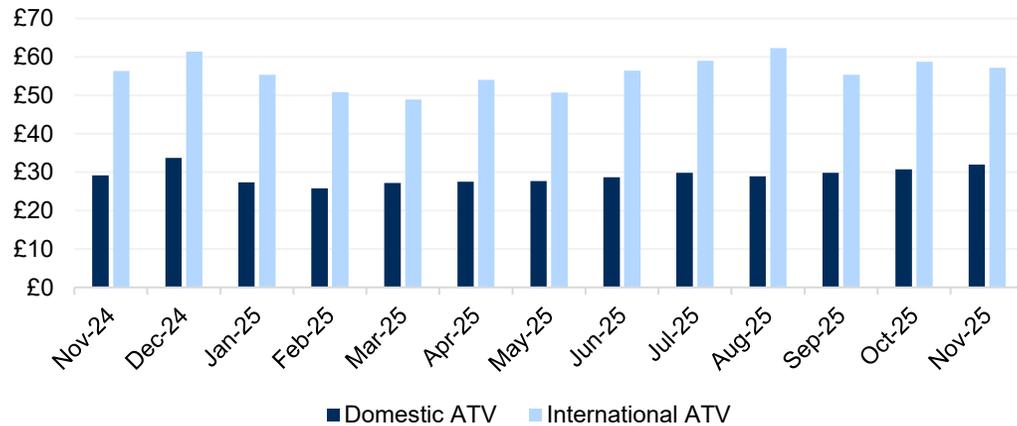
## International Spending - YoY % Change - November 2025

	Transactions	Average Transaction Value
Nov-25	25.7%	1.5%
Nov-24	0.3%	4.0%

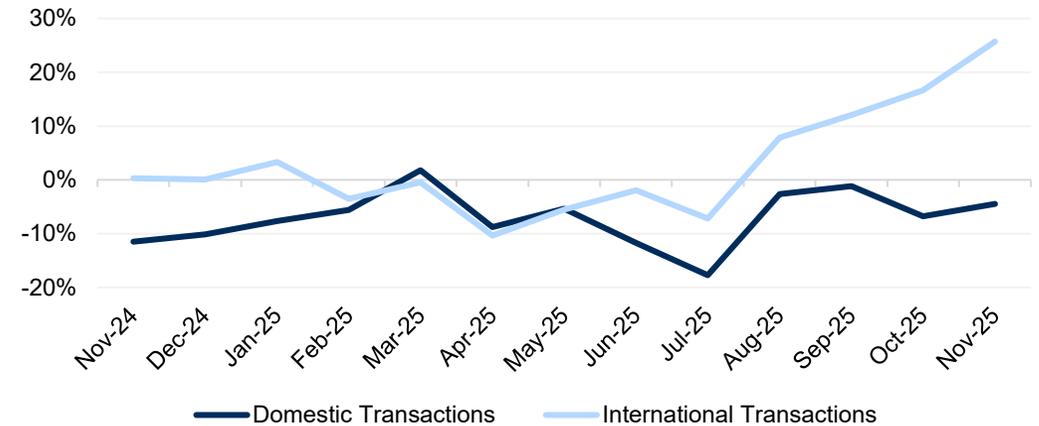
## Average Transaction Value - November 2025

	Domestic Spending	International Spending
Nov-25	£31.96	£57.15
Nov-24	£29.17	£56.31

Average Transaction Value - Domestic and International



Year on Year % Change in Transactions



Source: Savills

## Notes

- MRI monthly footfall is based on a 445 calendar. October 2025 spans Monday 6<sup>th</sup> October 2025 to Sunday 2<sup>nd</sup> November 2025 and November 2025 spans Monday 3<sup>rd</sup> November 2025 to Sunday 30<sup>th</sup> November 2025 . Annual % change is based on a comparison with the same weeks during October and November 2024.
- Savills spending data for the month is sourced from domestic and international Visa card transactions. The data is based on a total sample (not like for like), and so the result will reflect additions and reductions to the number of merchants in the sample, in addition to customer activity. It is estimated that the data accounts for circa 60% of total spending in the District.